

# SERVICE TRANSACTIONS

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Service Transactions are used to create services that are provided to the client. Creating a service will automatically generate needs.


The list of services can be update to meet the needs of the program.


## STEPS


Navigate to the Service Transactions tab in ClientPoint. The Service Transaction dashboard will allow you to Add a Need, Add a Service, Add Multiple Services, Add Referrals, View Previous Service Transactions, View Shelter Stays and View the Entire Service History


### Select Add Service


Service Transaction Dashboard


  
Add Need


  
Add Service

  
Add Multiple Services

  
Add Referrals

  
View Previous Service Transactions

  
View Shelter Stays

  
View Entire Service History

▼ Household Members

**i** To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.




(18) Single Parent

(61) Smile, Tammy (Primary Client)

(62) Smile, Nicole

Service Provider *	District of Columbia Homeless Management Information System (HMIS) (2)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Creating User	Patrice Guyton			
Start Date *	08 / 15 / 2023			2 : 10 : 27 PM
End Date	08 / 15 / 2023			2 : 10 : 27 PM
Service Type *	-Select-	<input type="button" value="Look Up"/>		
Provider Specific Service	-Select-			

Make sure the Service Provider is correct. Should be the same as your EDA provider. Start date and end date automatically populate.

- If you are completing the service the same day; then leave that information.
- If the service will not be completed in the same day;
  - remove the end date by clicking the circle   

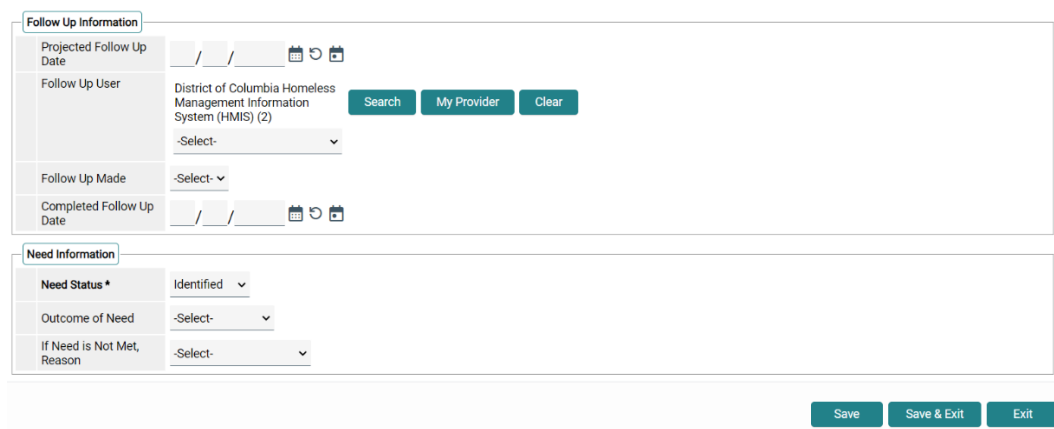
Select the Service Type for the drop-down list

**\*\*\*Some Providers have options under Provider Specific Service\*\*\***

Once you have selected the Service Type; Click Save & Continue

Input Service Notes – if needed

Scroll down to Need Information section



The screenshot shows two sections of a web form. The 'Follow Up Information' section includes fields for 'Projected Follow Up Date', 'Follow Up User' (with a search bar and buttons for 'Search', 'My Provider', and 'Clear'), 'Follow Up Made', and 'Completed Follow Up Date'. The 'Need Information' section includes dropdown menus for 'Need Status \*' (set to 'Identified'), 'Outcome of Need', and 'If Need is Not Met, Reason'. At the bottom right, there are buttons for 'Save', 'Save & Exit', and 'Exit'.

Need Status is automatically defaulted to Identified. Select the appropriate Need Status

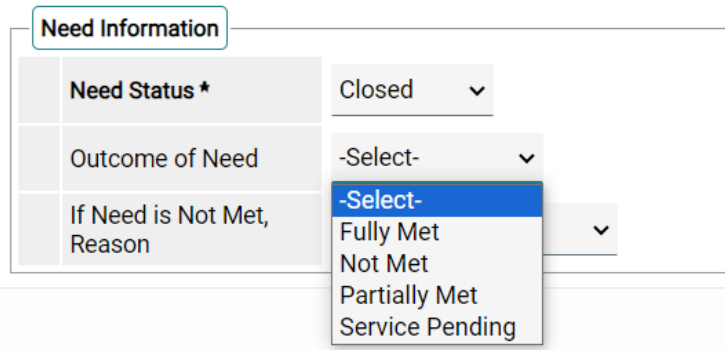
- Identified – is a service that you have created (no end date)
- In Progress – is a service that you are actively working to provide or you have referred (no end date)
- Closed – is a service that you have completed (end date completed)

**\*\*Need information section is important for reporting\*\***

If the Need Status is Closed;

Indicate the Outcome of Need

- Fully Met (end date)
- Not Met
- Partially Met
- Service Pending



This close-up shows the 'Need Information' section with the 'Need Status \*' dropdown set to 'Closed'. The 'Outcome of Need' dropdown menu is open, showing options: '-Select-', 'Fully Met', 'Not Met', 'Partially Met', and 'Service Pending'. The 'If Need is Not Met, Reason' dropdown is also visible but not selected.

Indicate the Outcome of Need

- Fully Met (end date)
- Not Met
- Partially Met
- Service Pending

If the Need is Not Met, select the reason

Need Information	
Need Status *	-Select-
Outcome of Need	Client Not Eligible Client Refused Service Service Does Not Exist Service Not Accessible
If Need is Not Met, Reason	-Select- ▼

Click Save and Exit; when finished.